

“THIS IS ONLY A PREVIEW OF THE EXAM QUESTIONS. TO TAKE THE ACTUAL EXAM, PLEASE GO BACK TO THE OFFICIAL BULLETIN, AND CLICK THE EXAM LINK AT THE BOTTOM.”

Training and Experience Questions for Insurance Examiner

Part 1 – Formal Education

1) For the different types of degrees or training options listed below, mark the one option that best describes your educational background from a nationally accredited university or institution.

- Graduate Degree with a:
Concentration in Accounting.
Concentration other than Accounting, and an undergraduate degree in Accounting.
Concentration other than Accounting, an undergraduate degree other than Accounting, and have completed at least 16 semester hours/units of accounting courses.
Concentration other than Accounting, and an undergraduate degree other than Accounting.
- Bachelors Degree or registered as a senior in:
Business Administration with a Concentration in Accounting.
Business Administration with a Concentration other than Accounting.
Business Administration or other subject area, and at least 16 semester hours/units of accounting courses.
a subject area other than Business Administration.
- Associates Degree in:
Business Administration.
Business Administration, and have completed at least 16 semester hours/units of accounting courses.
a subject area other than Business Administration.
a subject area other than Business Administration, and have completed at least 16 semester hours/units of accounting courses.
- Completion of 16 semester hours/units of accounting courses or an accounting curriculum from an accredited professional school or university (no degree).

- None of the above.

2) Indicate when you received your Bachelor's degree or training by marking the appropriate option below.

- Graduated more than five years ago and completed an average of 40 hours or more of continuing education units (CEU's) annually at a collegiate-grade institution
- Graduated more than five years ago and completed an average of 30-39 hours of CEU's annually at a collegiate-grade institution
- Graduated more than five years ago and completed an average of 20-29 hours of CEU's annually at a collegiate-grade institution
- Graduated more than five years ago and completed less than 20 hours of CEU's annually at a collegiate-grade institution
- Graduated within the last five years
- Will graduate within nine months
- This does not apply to me OR I did not receive any of the degrees or training listed above

Part 2 – Experience

Respond to each of the following statements by indicating how the statement applies to you. You should respond to every statement by marking one option for each of the 3 scales provided.

In responding to each statement, you may refer to your FORMAL EDUCATION, FORMAL TRAINING COURSES, and paid or unpaid WORK EXPERIENCE at an organization (e.g., full-time, part-time, internship)

To respond appropriately, you must refer to the Scale Descriptions on the following page when answering each statement.

Scale Descriptions

➤ **Knowledge related to performing this action:**

- **Extensive Knowledge**
(I possess an advanced knowledge level to the extent that I could effectively perform this action under the majority of circumstances or situations encountered; and I could competently instruct others on specific aspects of this action)
- **Moderate Knowledge**
(I possess a solid knowledge level that would allow me to perform this action successfully)
- **Minimal Knowledge**

(I have some knowledge of how to perform this action, but may require additional instruction to apply my knowledge effectively)

○ **No Knowledge**

(I have no knowledge of how to perform this action or what it may entail)

➤ **Experience related to performing this action:**

○ **Extensive Experience**

(I have performed this action so often, and across so many different contexts that I would undoubtedly be considered an expert by my peers and supervisors)

○ **Moderate Experience**

(I have performed this action multiple times during the course of a month, and could effectively perform this action if asked by a supervisor)

○ **Limited Experience**

(I have performed this action before, but would still be considered a beginner by my peers or supervisor, and would likely require assistance for successful performance)

○ **No Experience**

(I have never performed this action)

➤ **When this action was last performed:**

- Performed within the last year
- Performed between one and two years ago
- Performed more than two years ago
- Have never performed

Respond to each of the following statements by rating **a)** how much “knowledge” you have with respect to performing the task, **b)** how much “experience” you have performing the task, and **c)** how “recently” you have actually performed the task.

- 1) Follow oral instructions to complete assignments.**
- 2) Verbally convey detailed and technical information to people with varying levels of technical ability.**
- 3) Use preformatted templates in order to complete reports, forms, and/or correspondence.**
- 4) Compose letters, memos, e-mails, or other written correspondence to acquire or convey information.**

- 5) **Write detailed summaries or reports of analyses or other research work performed.**
- 6) **Apply mathematics such as addition, subtraction, multiplication, division, fractions, ratios and/or percentages to perform financial analyses.**
- 7) **Calculate figures using Sunder binary techniques to predict financial outcomes.**
- 8) **Analyze financial statements to draw appropriate conclusions or make recommendations.**
- 9) **Review and identify relevant information from complex written documents in order to draw appropriate conclusions.**
- 10) **Apply analytical tools including Insurance Affirmative Information System, Annual Scoring Criterion Results, and Company Portfolio Results to complete financial analysis.**
- 11) **Interpret various charts, tables, and graphs that summarize numerical information and draw appropriate conclusions.**
- 12) **Analyze financial information and/or narrative reports to draw appropriate conclusions or make recommendations.**
- 13) **Follow written instructions to complete assignments.**
- 14) **Use a computer keyboard to complete tasks or assignments.**
- 15) **Use word processing software (e.g., Microsoft Word) to create written documents including correspondence and reports.**
- 16) **Create spreadsheets using spreadsheet software (e.g., Microsoft Excel, etc.)**
- 17) **Perform mathematical computations using spreadsheet software (e.g., Microsoft Excel, etc.)**
- 18) **Perform computations and operations with the Accounting Practitioners' Function (APF) in Microsoft Excel.**
- 19) **Develop charts, tables, and graphs using spreadsheet software to display numerical information.**
- 20) **Work within the Microsoft Windows operating system environment to complete tasks or assignments.**

- 21) Analyze financial data using the trends and key performance indicators using Microsoft Access tools-spinner, scroll bars, and conditional formatting.**
- 22) Prioritize multiple assignments to meet scheduled deadlines.**
- 23) Exercise good judgment when completing tasks or assignments.**
- 24) Perform multiple tasks simultaneously.**
- 25) Effectively work with uncooperative, frustrated, angry or uninformed people when completing tasks or assignments.**
- 26) Adapt to new working environments and cultures.**
- 27) Communicate with others to discuss and resolve pertinent issues affecting assignments or the work environment.**
- 28) Communicate with others to diffuse potentially volatile situations that may negatively impact relationships with others while completing tasks or assignments.**
- 29) Use Generally Accepted Accounting Principles to determine if financial presentation is appropriate.**
- 30) Use the Internet to research and acquire information needed to complete specific tasks or assignments.**
- 31) Apply Statutory Accounting Principles to audits, examinations, or other assigned tasks.**
- 32) Refer to reference manuals and other sources to obtain the necessary information for completing tasks or assignments.**
- 33) Refer to Accounting Principles Board to clarify compliance-related financial issues.**
- 34) Refer to the Accounting Standards and Practices On-line Directory (ASPOD) to verify the accuracy of reported financial analysis.**
- 35) Perform reconciliations using relevant financial information.**